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PURCHASING USER MANUAL

ATTACHING SCANNED DOCUMENTS

INTRODUCTION

You can attach scanned documents to requisitions, requisition line items, purchase orders, or purchase order line items using the attachment icon.

Documents must be scanned at your agency or agency field location and saved on a local or network hard drive. You must then browse for and upload the scanned files into the application. Once a scanned document is attached, it cannot be deleted.

TO CREATE AN ATTACHMENT

1. Click the attachment icon appropriate for your needs:
 - **Req Atch** or **PO Atch** – for attachments associated with the requisition or purchase order in general.
 - **Atch** – line item attachments specific to the line item.

Figure 1 - Requisition attachments

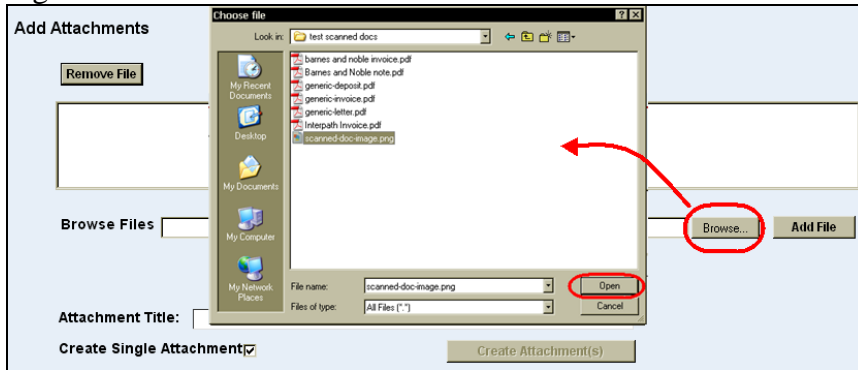
The screenshot shows the 'Requisition' tab in the application. The 'Req Atch' button is circled in red. The interface includes fields for Department (RAD: Research and Development), Req # (260), Tracking # (260), Need by date (04/10/2008), and Desc. There are buttons for 'New Requisition', 'Save', 'Print Preview', 'Make Template', and 'Delete Requisition'. A table at the bottom shows the requisition details with columns for Menu, Notes, Atch, Status, Item #, Description, Qty, U/M, Price, SubTotal, and Workflow.

Figure 2 - Purchase order attachments

The screenshot shows the 'PO' tab in the application. The 'PO Atch' button is circled in red. The interface includes fields for Department (WKP: Worker PO), PO # (WKP80004), Vendor #, Required Delivery date, and Status (In Purchasing). There are buttons for 'New PO', 'Save', 'Print Preview', 'Approve', and 'Delete PO'. A table at the bottom shows the purchase order details with columns for Sel, Req #, Need By, Notes, Atch, Status, Item #, Description, Qty, U/M, Price, and SubTotal.

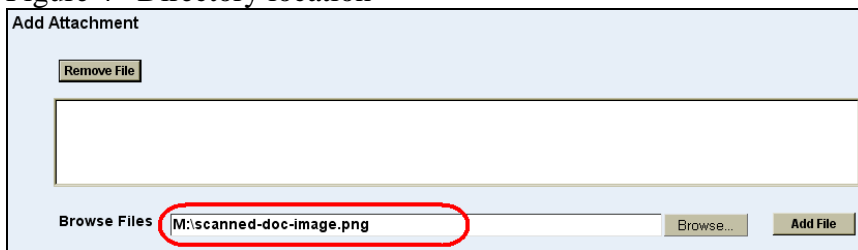
2. Click **Browse** to locate your scanned document file. Valid types include files with the following extensions: .pdf,.jpg,.gif,.bmp,.png,.tif,.tiff. (The file extension .jpeg will not work.)

Figure 3 - Browse for scanned document



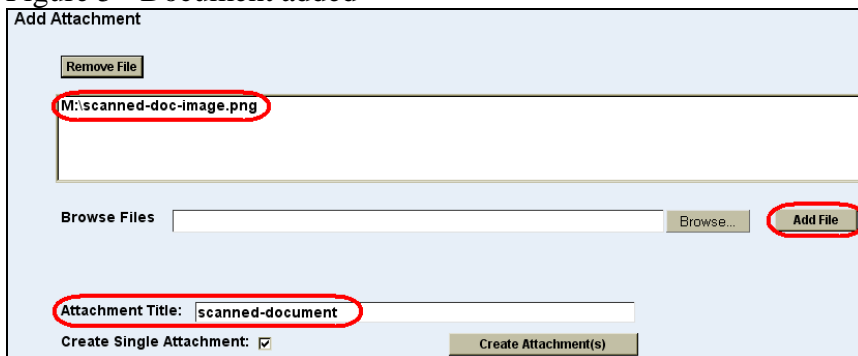
3. Highlight the scanned document file and click **Open**. The directory location of the document will appear in the **Browse Files** field.

Figure 4 –Directory location



4. Click **Add File**. The document will be added to a queue. The filename (without the extension) of the scanned document will be automatically entered in the **Attachment Title** field.

Figure 5 - Document added



5. If desired, change the **Attachment Title** to something more suitable for the document. Otherwise, leave the default title based on the file name.
6. For only one document, leave **Create Single Attachment** checked. If you have changed the **Attachment Title**, this will apply the change. For more than one file, see [Attaching Multiple Documents](#) section below.
7. Click **Create Attachment(s)**. The document will appear in the **Attachments** area. (Click **View** if you want to view the attachment.) Once a scanned document is attached, it cannot be deleted.

Figure 6 - Attached document with View

Attachments				
Attachment Title	Date	Size	Action	
scanned-document	4/7/2008 8:40:44 AM	16K	View	

Add Attachment

Remove File

ATTACHING MULTIPLE DOCUMENTS

You can create attachments from multiple scanned documents either one at a time or all at once. If you create the attachments at one time, you will not be able to enter unique **Attachment Titles** for each one. In order to add multiple documents and give them unique Document Titles, add and create the attachments one at a time. Once a scanned document is attached, it cannot be deleted.

1. Repeat the steps above to add a second document to the queue. Note the **Attachment Title** field remains the same from the first document added. In the example below, the file “generic-letter.pdf” was added, but the name from the first file, “generic-invoice” is still in the **Attachment Title** text box.
2. Continue adding as many documents as needed.

Figure 7 - Adding multiple documents

Remove File

M:\Payment Services\test docs\generic-invoice.pdf
M:\Payment Services\test docs\generic-letter.pdf

Browse Files
Browse...
Add File

Attachment Title: generic-invoice

☒ Create Single Attachment

3. Leave **Create Single Attachment** checked or click the check box to clear it. Your choice will affect the **Attachment Title** of the attached documents:
 - a. Leave the checkbox checked, click **Create Attachment(s)**, and all of the documents will have the *same* **Attachment Title** based on the filename of the first document added.

Figure 8 - Same document title

The screenshot shows the 'Attachments' section with a table containing two rows, both with the title 'generic-invoice'. Below the table is the 'Add Attachments' section, which includes a 'Remove File' button, a large text input field, a 'Browse Files' button, and a 'Browse...' button. At the bottom, there is an 'Attachment Title' input field and a 'Create Single Attachment' checkbox, which is checked. A red dashed arrow points from the checked checkbox to the first row of the table.

Attachments Title	Size	Action
generic-invoice	22K	View Delete
generic-invoice	7K	View Delete

Add Attachments

[Remove File](#)

Browse Files [Browse...](#) [Add File](#)

Attachment Title:

☒ Create Single Attachment [Create Attachment\(s\)](#)

- b. Clear the **Create Single Attachment** check box, click **Create Attachment(s)**, and the documents will have *different* **Attachment Titles** based on their filenames.

Figure 9 - Different document titles

The screenshot shows the 'Attached Documents' section with a table containing two rows with different titles: 'generic-invoice' and 'generic-letter'. Below the table is the 'Add Attachments' section, which includes a 'Remove File' button, a large text input field, a 'Browse Files' button, and a 'Browse...' button. At the bottom, there is an 'Attachment Title' input field and a 'Create Single Attachment' checkbox, which is unchecked. A red dashed arrow points from the unchecked checkbox to the first row of the table.

Attachments Title	Size	Action
generic-invoice	22K	View Delete
generic-letter	7K	View Delete

Add Attachments

[Remove File](#)

Browse Files [Browse...](#) [Add File](#)

Attachment Title:

☐ Create Single Attachment [Create Attachment\(s\)](#)

SCANNER SETTINGS

Several factors must be considered when scanning documents for your agency, – e.g., the type of scanner or multi-function machine you use and its settings, hard disk storage capacity at your agency, and the type of originals (size and color of paper, size and color of print, etc.). Each agency will need to develop their own best practices appropriate for their environment. Two settings often found on scanners and multi-function machines are:

Resolution: Generally scanners will offer a scanning resolution setting expressed in “dpi” or dots per inch. The lower the setting the smaller the file size, but the worse quality of image produced. With most documents, a setting of 150dpi seems to work well.

File formats: Your particular scanner or and multi-function machines may be capable of producing a variety of file formats (e.g., .pdf,.jpg,.gif,.bmp,.png,.tif,.tiff). For many agencies, .jpg and .pdf work well.

You should test your own equipment to see which resolution and file format settings create the smallest file size with acceptable visual quality.

DOCUMENT RETENTION

Your agency may need to develop document retention rules to determine if copies will be kept by your agency as well and for how long. Refer to the [Department of Administration’s Web site](#) for record retention information.